

**AMENDMENTS**

*In the Claims*

1. **(Currently Amended)** A computer system comprising:
  - a processor;
  - a memory, coupled to the processor, and storing instructions executable on the processor,
    - the instructions comprising
    - a forecast series creation set of instructions, wherein
      - a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters
      - identify hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization, wherein the hierarchy structure comprises a plurality of management levels,
      - identify an acceptable range of dates over which forecasts generated from the forecast series cover,
      - identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,
      - identify forecast data to be automatically analyzed to generate forecasts from the forecast series,
      - identify a visibility mode for forecasts generated from the forecast series,
    - are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to

be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request, and

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value  $n$  defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to  $n$  levels below a management level occupied by the manager, and there is at least one level in the hierarchy structure that is below the last level included in the search scope,

an opportunity and revenue scheduling creation set of instructions to identify forecast data, **and**

a forecast creation set of instructions that define attributes of **the a** particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series, to generate the particular forecast, **and**

said processor configured to generate the particular forecast using the forecast series.

2. (Previously Presented) The computer system of claim 1, wherein the forecast series creation set of instructions further comprises instructions to define the visibility rules that specify the forecast data that are visible to each management level of the organization to be stored on the storage device, and include the visibility rules in the forecast series, and the forecast creation set of instructions further comprises instructions to generate a forecast for any management level of the organization, wherein

each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

3. – 4. (Canceled)

5. (Previously Presented) The computer system of claim 1 wherein the opportunity and revenue scheduling creation set of instructions further comprises instructions to enable a member of the organization to submit a forecast to a superior; and prevent the member from modifying the forecast after it has been submitted.

6. (Previously Presented) The computer system of claim 5, wherein the forecast creation set of instructions further comprises instructions to present forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

7. – 11. (Canceled)

12. (Currently Amended) A computer system comprising:  
a processor;  
a memory, coupled to the processor, and storing instructions executable on the processor,  
the instructions comprising  
a forecast series creation set of instructions, wherein  
a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters  
identify hierarchy data defining members of an organization and a hierarchical position of each member in a hierarchy comprising a plurality of management levels,

determine an identity of a current forecast participant who is a member of the organization,

identify members of the organization who are subordinate to the current forecast participant based on the hierarchy data,

identify an acceptable range of dates over which forecasts generated from the forecast series cover,

identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate the forecasts from the forecast series,

identify a visibility mode for the forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the current forecast participant, the identity of members of the organization who are subordinate to the current forecast participant, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request, and

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value  $n$  defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy that is less than or equal to  $n$  levels below a management

level occupied by the manager, and there is at least one level in the hierarchy that is below the last level included in the search scope, an opportunity and revenue scheduling creation set of instructions to identify forecast data corresponding to the members of the organization, and a forecast creation set of instructions that define attributes of ~~the~~ a particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series, the forecast creation set of instructions comprising instructions to generate forecasts for one or more members of the organization who are identified as being subordinate to the current forecast participant, using the forecast series, and present forecast data to the current forecast participant, and said processor configured to generate the particular forecast using the forecast series.

13. (Previously Presented) The computer system of claim 12, wherein the current forecast participant is a manager whose forecast is determined, at least in part, on forecasts that are submitted by one or more selected members of the organization who are subordinate to the manager, and the forecast creation set of instructions further comprises instructions to automatically generate a forecast for any member among said one or more selected members who has yet to submit a forecast, and generate a forecast for the manager based on a combination of forecasts submitted by said one or more selected members and any forecast that is automatically generated.

14. (Previously Presented) The computer system of claim 13 wherein the forecast creation set of instructions further comprises instructions to automatically calculate forecasts for said one or more selected members of the organization who are subordinate to the manager and have not submitted their forecast in a recursive manner from lower levels to higher levels in the organization's hierarchy, wherein

the manager occupies at least a second level of management in the organization's hierarchy.

15. **(Currently Amended)** A system comprising:

a processor;

a memory, coupled to the processor, and storing instructions executable on the processor,

the instructions comprising

a forecast series creation set of instructions, wherein

- a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters
- identify hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of members of the organization, wherein the hierarchy structure comprises a plurality of management levels,
- identify rules that specify forecast data that are visible to each member of the organization,
- identify an acceptable range of dates over which forecasts generated from the forecast series cover,
- identify members of the organization to be included in the forecast, the members derived from the hierarchy,
- identify forecast data to be automatically analyzed to generate forecasts from the forecast series,
- identify a visibility mode for forecasts generated from the forecast series,
- are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the rules, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast,

the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request, and

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value  $n$  defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to  $n$  levels below a management level occupied by the manager, and there is at least one level in the hierarchy structure that is below the last level included in the search scope,

an opportunity and revenue scheduling creation set of instructions to send data comprising a set of interactive HTML components via a computer network to a client, a portion of which enable forecast data corresponding to members of the organization to be entered via the client, **and**

a forecast creation set of instructions that define attributes of **the a** particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series to

generate the particular forecast for members of the organization using the forecast series, wherein each forecast is generated based on forecast data that are visible to corresponding members according to the visibility rules, and

send forecast data corresponding to the forecast to the client to be viewed by a user through use of the set of interactive HTML components, **and**

said processor configured to generate the particular forecast using the forecast series.

16. (Previously Presented) The system of claim 15, wherein the forecast series creation set of instructions further comprises instructions to define visibility rules that specify the forecast data that are visible to each management level of the organization, and include the visibility rules in the forecast series, and the forecast creation set of instructions further comprises instructions to generate a forecast for any management level of the organization, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

17. – 18. (Canceled)

19. (Previously Presented) The system of claim 15, wherein the forecast creation set of instructions further comprises instructions to: enable a member of the organization to submit a forecast to a superior; and prevent the member from modifying the forecast after it has been submitted.

20. (Previously Presented) The system of claim 19 wherein the forecast creation set of instructions further comprises instructions to enable one or more of the superior to which the forecast was submitted and a system administrator to unsubmit the forecast such that the member who submitted that forecast is enabled to modify the forecast.

21. (Previously Presented) The system of claim 15, wherein the forecast creation set of instructions further comprises instructions to send data to the client, and the set of interactive HTML components are configured to present the forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

22. – 27. (Canceled)

28. **(Currently Amended)** A system comprising:

a processor;

a memory, coupled to the processor, and storing instructions executable on the processor,

the instructions comprising

a forecast series creation set of instructions, wherein

    a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters

    identify hierarchy data defining members of an organization and a hierarchical position held by each member to be stored in a database in a hierarchy comprising a plurality of management levels,

    determine an identity of a current forecast participant who is a member of the organization and using the client,

    identify members of the organization who are subordinate to the current forecast participant based on the hierarchy data,

    identify an acceptable range of dates over which forecasts generated from the forecast series cover,

    identify members of the organization to be included in the forecast, the members derived from the hierarchy,

    identify forecast data to be automatically analyzed to generate the forecasts from the forecast series,

    identify a visibility mode for the forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the current forecast participant, the identity of members of the organization who are subordinate to the current forecast participant, the identity of the acceptable range of dates, the identity of members of the organization to be

included in the forecast, the identity of forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request, and

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value  $n$  defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy that is less than or equal to  $n$  levels below a management level occupied by the manager, and there is at least one level in the hierarchy that is below the last level included in the search scope,

an opportunity and revenue scheduling creation set of instructions to send data corresponding to a set of interactive HTML components via a computer network to a client that enable forecast data corresponding to members of the organization to be entered by a user of the client, **and**

a forecast creation set of instructions that define attributes of **the a** particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series to

generate forecasts, using the forecast series, for one or more members of the organization who are identified as being subordinate to the current forecast participant, and

send forecast data to the client to be displayed to the user via the set of interactive HTML components, **and**

said processor configured to generate the particular forecast using the forecast series.

29. (Previously Presented) The system of claim 28, wherein the current forecast participant is a manager whose forecast is determined, at least in part, on forecasts that are submitted by one or more selected members of the organization who are subordinate to the manager, and the forecast creation set of instructions further comprises instructions to automatically generate a forecast for any member among said one or more selected members who has yet to submit a forecast, and generate a forecast for the manager based on a combination of forecasts submitted by said one or more selected members and any forecast that is automatically generated.

30. (Previously Presented) The system of claim 29, wherein the forecast creation set of instructions further comprises instructions to automatically calculate forecasts for said one or more selected members of the organization who are subordinate to the manager and have not submitted their forecast in a recursive manner from lower levels to higher levels in the organization's hierarchy, wherein the manager occupies at least a second level of management in the organization's hierarchy.

31. – 44. (Canceled)

45. (Previously Presented) A computer implemented method comprising: receiving an identification of hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization, wherein the hierarchy structure comprises a plurality of management levels; receiving an identification of an acceptable range of dates over which forecasts generated from a forecast series cover; receiving an identification of members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;

receiving an identification of forecast data to be automatically analyzed to generate the forecasts from the forecast series;

receiving an identification of a visibility mode for the forecasts generated from the forecast series;

generating the forecast series comprising the identity of the hierarchy data, the identity of the date and the period of time, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, wherein

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value  $n$  defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to  $n$  levels below a management level occupied by the manager,

there is at least one level in the hierarchy structure that is below the last level included in the search scope, and

said generating the forecast series is performed using a first computer processor;

storing the forecast series, wherein

the stored forecast series is accessible for use in generation of a particular forecast upon request, and

said storing is performed using a memory coupled to the first computer processor;

and

generating the particular forecast using the forecast series wherein

said generating the particular forecast is performed using a second computer processor.

46. (Previously Presented) The computer implemented method of claim 45, wherein the hierarchy structure comprises a plurality of management levels and further comprising:

receiving a definition of the visibility rules; and

generating a forecast for any management level of the organization using the forecast series, wherein each forecast that is generated is based on forecast data that are

visible to the management level for which that forecast corresponds as specified by the visibility rules, wherein  
said generating the forecast is performed using a third computer processor.

47. (Previously Presented) The computer implemented method of claim 45, further comprising presenting the forecast in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member, wherein

    said presenting the forecast in a graphical format is performed using a display coupled to a third computer processor.

48. (Previously Presented) A machine-readable media on which a plurality of machine-executable instructions are stored that when executed by a machine generates forecast information corresponding to an organization by performing the operations of:

    identifying hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization, wherein the hierarchy structure comprises a plurality of management levels;

    identifying an acceptable range of dates over which forecasts generated from a forecast series cover;

    identifying members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;

    identifying forecast data to be automatically analyzed to generate the forecasts from the forecast series;

    identifying a visibility mode for the forecasts generated from the forecast series;

    generating the forecast series comprising the identity of the hierarchy data, the identity of the date and the period of time, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, wherein

    the forecast series further comprises visibility rules, including a maximum hierarchy depth search value n defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization

who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, and there is at least one level in the hierarchy structure that is below the last level included in the search scope; storing the forecast series, wherein the stored forecast series is accessible for use in generation of a particular forecast upon request; and generating the particular forecast using the forecast series.

49. (Canceled)

50. (Previously Presented) A computer implemented method comprising: receiving an identification of hierarchy data defining a hierarchy structure of an organization, wherein the hierarchy data comprises a hierarchical position of each member of the organization, and the hierarchy structure comprises a plurality of management levels; receiving an identification of an acceptable range of dates over which forecasts generated from a forecast series cover; receiving an identification of members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy; receiving an identification of forecast data to be automatically analyzed to generate the forecasts generated from the forecast series; generating a forecast series comprising the identity of the hierarchy data, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, and the identity of the forecast data to be automatically analyzed, wherein the forecast series further comprises visibility rules, including a maximum hierarchy depth search value n defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a

management level in the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, there is at least one level in the hierarchy structure that is below the last level included in the search scope, and said generating is performed using a first computer processor; storing the forecast series, wherein the stored forecast series is accessible for use in generation of a particular forecast upon request, and said storing is performed using a memory coupled to the first computer processor; and generating the particular forecast using the forecast series, wherein said generating the particular forecast is performed using a second computer processor.

51. – 64. (Canceled)

65. (Previously Presented) The computer system of claim 1, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

66. (Previously Presented) The computer system of claim 12, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

67. (Previously Presented) The system of claim 15, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

68. (Previously Presented) The system of claim 28, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

69. (Previously Presented) The computer implemented method of claim 45, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

70. (Previously Presented) The machine-readable media of claim 48, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.

71. (Previously Presented) The computer implemented method of claim 50, wherein the forecast series further comprises a field indicating whether the forecast series is available for forecasting purposes.